Sharing Travelers among ICs

In the NBS Travel System, a traveler can travel for multiple ICs and have their travel documents routed accordingly. However, the traveler may belong to only one routing list at a time. This document outlines the business process associated with changing a routing list assignment for an individual who travels for more than one IC.

TERMINOLOGY	
• Group	• Represents an IC in the NBS Travel System.
• Group Member	• The list of travelers for an IC. If a travel planner does not see an individual traveler in the Traveler Listing screen, the Organization Administrator needs to add the traveler to their Group.
• Owning IC	• The IC that "owns" the traveler. This is the IC for whom the traveler primarily works.
• Paying IC	• The IC that is paying for the trip.

BUSINESS PROCESS FOR SHARING TRAVELERS
Before the Trip is Planned

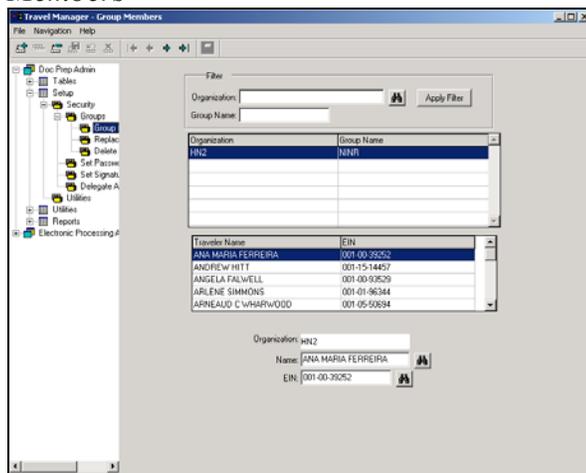|	
☐	1) The Organization Administrator (OA) from the paying IC adds the traveler to his/her group.
☐	2) Referring to the OA contact list on the web (http://nbs.nih.gov/pdf/OAlist.pdf), the OA from the paying IC contacts the OA from the owning IC and requests that they do the following:
☐	a) Send an email to the other OAs at the traveler's owning IC advising them of the following: i) Another IC is currently creating travel documents for this traveler ii) Until further notification, please do not make any traveler profile changes iii) Request that they forward this information to the Travel Planner(s) who normally plan travel for this traveler
☐	b) In the traveler's profile, assign him/her to the appropriate routing list for the paying IC
☐	c) Modify the Charge Card Status in the traveler's profile as appropriate for this trip
☐	d) Leave the traveler's profile unchanged for 24 hours, while the trip is planned and the travel documents are created

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	BUSINESS PROCESS FOR SHARING TRAVELERS
	After the Trip is Planned
☐	1) If this was a one-time trip, the OA from the paying IC deletes the traveler from their group, OR If the individual regularly travels for their IC the paying IC leaves the traveler in their group.
☐	2) The OA from the paying IC again contacts the OA from the owning IC to announce that the travel documents have been created and the traveler's profile may be returned to its previous state.
☐	3) The OA from the owning IC then does the following:
☐	a) In the traveler's profile, reassigns the traveler to the appropriate routing list for the owning IC
☐	b) Makes any necessary modifications to the Charge Card Status in the traveler's profile
☐	c) Sends another email to the other OAs at the IC advising them of the following: i) Travel documents may again be created for this traveler ii) Request that they forward this notice to the Travel Planner(s) who normally plan travel for this traveler.

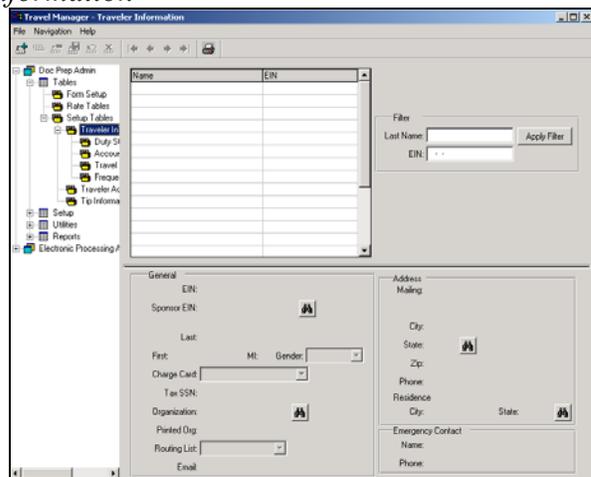| SAMPLE SCREEN SHOTS IN THE GTM 8.1 ADMIN MODULE	
Doc Prep Admin>Setup>Security>Groups>Group Members	*Doc Prep Admin>Tables>Setup Tables>Traveler Information*